Welcome to the California Leads Conference

- The presentation will begin shortly.
- All participants will be muted upon entry.
- Live presentations will not be recorded.
- Please use the chat feature to direct questions to “All panelists.” When submitting questions, please do not include any personal information.
- Connecting to audio – “Call using computer” for audio to come through your computer speakers or use “Call in/Call me” feature.
Preparing to Meet with Union Representatives
Audience

You should be in this class if you are an active labor relations practitioner.
Training Ground Rules

• Keep yourself on mute.
• There will be places in the presentation for questions. As an alternate in between these points, submit your questions on the chat function.
• Do not interrupt the presenters or those asking questions or providing feedback.
What We Will Cover

This interactive session explores best practices regarding:
- Preparing for successful meetings with Union Representatives.
- The mechanics of release time.
Meeting Lifecycle

Three phases of the meeting lifecycle:

– Preparation
– Conducting the Meeting
– Debriefing/Follow-up
Why are you meeting?

What is your generating event:

– Notice
– JLMC
– Contract Requirement
– Meet and Greet
– Other
Preparing Your Meeting

• Understand the issue you will be meeting on.
• Select the right management representatives to assist you in the meeting.
• What information do you need, who will get it for you.
• Do you need a notetaker?
• Is an agenda or outline appropriate?
Questions
What is the issue?

Anticipate Questions:
- Be comfortable placing yourself on the other side of the table. What you want to know, the others will likely want to know as well.
- Is this a topic historically important to the specific Union?
- Understand the position of the union, this will likely focus the types of questions they will have.
- Know state and departmental labor trends.
Selecting Representatives (1/2)

• Representatives should be trustworthy, not in the bargaining unit and should be able to convey a sense of authority or command over the subject or issue in discussion.
• Representatives should have a basic understanding of the role of the parties and their role in the meeting.
• Representatives should have an assertive but problem solving approach.
Selecting Representatives (2/2)

Each meeting should have:

– Chief Negotiator/Main Spokesperson
– Subject Matter Expert(s)
– Notetaker
Setting a Pre-Meeting

• Pre-meetings should be held with sufficient time for any last minute homework or items to be prepared or researched.
• Should include all participating management representatives.
• Should allow time for additional information, adjustments to be made prior the meeting.
• All the management attendees should participate.
Conference Room, Material and Equipment

• Determine size of room required (or attendees on Teams, WebEx, Zoom, etc.)
• Do you need a caucus room or line?
• What equipment or material will you need, ensure you have it ahead of the meeting.
• If you have equipment, test it.
• If you have material, review it (all of it).
Day of the Meeting

- Be calm
- Review your notes
- Review your attendees
- Prepare seating – yes it can matter.
Questions
State Release Time (1/6)

• What is it
• Why authorize it
• Who authorizes it
• What controls it
• What is reasonable
State Release Time (2/6)

What is it?

– State Release Time is authorized state time granted to state employees to participate in meetings with management as a representative of the union.

– While on State Release Time the employee shall suffer no loss in compensation for participating during the meeting or pre or post activities agreed upon by the parties.

– State Release Time counts as hours worked, unless specifically modified by agreement i.e. MOU, Ground Rules.
State Release Time (3/6)

Why authorize it:
– Because it is the ‘law’, provided by terms of the contract and encourages harmonious labor relations.
State Release Time (4/6)

Who authorizes it?

– State Release Time for departmental meetings, or delegated meetings are approved by the departmental Labor Relations Officer.

– For non-delegated Meet and Confers or CalHR owned meetings CalHR will authorize State Release Time.
State Release Time (5/6)

What controls it:

– The MOU, side letter agreements, or other legally binding tenants.
What is Reasonable?

– Many sections of most MOUs provide that State Release Time shall be reasonably provided.
– Reasonable is an objective word, and requires an objective test.
– Time off requests are reasonable if they are:
  • Easily identifiable to the issue
  • Not overreaching in nature
– Litmus Test: Do you need the same amount of pre and post meeting or preparation time.
Questions
Tips on Communicating with the Union (1/2)

• Build and maintain good rapport
• Mutual respect and acknowledgement of each other’s value in the workplace.
• Working together in a collaborative environment.
• This approach has the benefit of increasing management / employee communication and engagement in the workplace while also helping management understand the challenges employees are facing on the job.
Tips on Communicating with the Union (2/2)

• Be polite, courteous and respectful.
• Ensuring the right practices are in place so employees can perform their responsibilities under the terms and conditions of the contract.
• Make your position clear
• Strive for win / win.
Tips on Working with the Union When Conflicts Arise

• Conflict is rarely one-sided. Each party owns a role.
• Place yourself in role of the other person as it assists in understanding.
• Refrain from assigning blame during discussions.
• Point to missed communication opportunities.
• Understand the *why* of both parties actions.
• Aim for mutual acceptance the *win / win*
Other Tips on Working with the Union

- Union Reps may be assertive
- Remain calm and do not take anything personal
- If you become angry, take space in a caucus to regain your composure and perspective
- Keep an open mind.
- Continue to actively listen for understanding.
- This means do not argue their point in your head like a debate. You will often miss details.
- Understanding our own emotions and the emotions of others.
Questions